National Institutes of Health

Public Information & Communication Services Contract (PICS)

Standard Operating Procedures

November 20, 2015



Public Information and Communication Services

Standard Operating Procedures

FOREWARD

The National Institutes of Health (NIH) Public Information and Communication Services (PICS) award mechanism is intended to assist NIH and its component Institutes and Centers (ICs) to achieve and maintain high quality performance in the areas of media, communication, and information dissemination and technology. The PICS vehicle is structured as 25 Indefinite Delivery / Indefinite Quantity (IDIQ) contracts awarded to small business entities. Task orders are to be issued under the 25 contracts to acquire services as desired.

The Standard Operating Procedures (SOP) herein contain guidelines for utilizing the NIH PICS contract vehicle, covering the roles and responsibilities of all involved parties, including contractor personnel.

The task orders will be awarded under the Federal Acquisition Streamlining Act (FASA) which requires that the prime contractors be given a Fair-Opportunity-to-be-Considered (FOC) for task order awards.

Please refer to the PICS Website (http://PICS.olao.od.nih.gov) and/or contact the PICS Program Support Team (PICS1@mail.nih.gov) if you have any questions, need additional information, and/or require official documentation and administration related to task order establishment.

The PICS award mechanism will operate using the PICS electronic Government Ordering System (eGOS), when available and implemented. This SOP will be updated at that time to provide specific, streamlined guidance on how to use eGOS in placing a task order.

Task Order Guidelines are subject to change; please refer to the latest version in effect. The latest version will supersede all earlier versions.



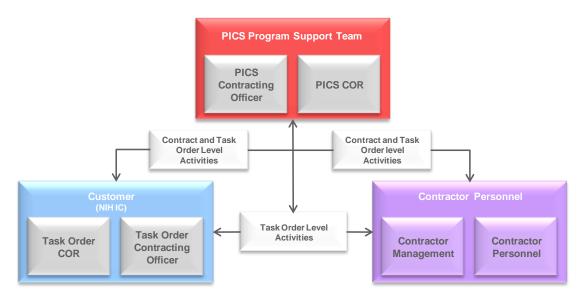


ACRONYMS

The following is a list of acronyms used throughout this document.

<u>Abbreviation</u>	Full Name
СО	Contracting Officer
COAC	Consolidated Operations Acquisitions Centers
COR	Contracting Officer's Representative
eGOS	Electronic Government Ordering System
FAR	Federal Acquisitions Regulation (http://www.acquisition.gov/far)
FASA	Federal Acquisition Streamlining Act
FP	Fixed Price
IC	Institutes and Centers
ID/IQ	Indefinite Delivery/Indefinite Quantity
IGCE	Independent Government Cost Estimate
NIH	National Institutes of Health
OLAO	Office of Logistics and Acquisition Operations
PICS	Public Information & Communication Services
SOW	Statement of Work
SRD	Selection Recommendation Document
T&M	Time & Materials
TO	Task Order
TORP	Task Order Request Package

PICS ORGANIZATIONAL CHART



Additional details of the roles and responsibilities shown in the diagram above are described in Section 2.





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1 GENERAL INFORMATION

The Public Information and Communication Services (PICS) Contract is an acquisition vehicle available to all Institutes and Centers (ICs) and offices within the National Institutes of Health (NIH) to purchase communication goods and services, namely when this expertise does not exist in-house. This multiple award contract with 25 small business contractors will be used by NIH to procure media, communications, and information dissemination and technology on a task order (TO) basis. In technical terms, PICS is an Indefinite Delivery/Indefinite Quantity (IDIQ) contract, which affords customers the ability to order services after requirements materialize, providing NIH with flexibility in both quantities and delivery scheduling. Additional information including the scope, labor categories, and services related to PICS can be found in the following sections.

The contract period of performance will consist of a base year performance period and four one-year option periods.

1.1 Non-Personal Services and Inherently Government Functions

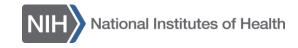
Pursuant to FAR 37.1, no personal services shall be performed under this contract. All work requirements shall flow only from the Contracting Officer's Representative (COR) to the contractor's Project Manager. No contractor employee will be directly supervised by the Government. All individual employee assignments, and daily work direction, shall be given by the applicable employee supervisor. If the contractor believes any Government action or communication has been given that would create a personal services relationship between the Government and any contractor employee, the contractor shall promptly notify the Contracting Officer of this communication or action.

Pursuant to FAR 7.5, the contractor shall not perform any inherently governmental actions under this contract. No contractor employee shall hold him or herself out to be a Government employee, agent, or representative. No contractor employee shall state orally or in writing at any time that he or she is acting on behalf of the Government. In all communications with third parties in connection with this contract, contractor employees shall identify themselves as contractor employees and specify the name of the company for which they work. In all communications with other Government contractors in connection with this contract, the contractor employee shall state that they have no authority to in any way change the contract and that if the other contractor believes this communication to be a direction to change their contract, they should notify the Contracting Officer for that contract and not carry out the direction until a clarification has been issued by the Contracting Officer.

The contractor shall insure that all of its employees working on this contract are informed of this information. Nothing in this section shall limit the Government's rights in any way under the other provisions of the contract, including those related to the Government's right to inspect and accept the services to be performed under this contract. The substance of this section shall be included in all subcontracts at any tier.

1.2 Labor Categories

The contractor shall maintain a management structure with overall task order control and authority for the performance of the work. At a minimum, the contractor's management structure shall be responsible for the following throughout the life of each task order:





- a) Deploying a technically proficient and professionally capable staff.
- b) Keeping personnel turnover to a minimum and ensuring individuals are motivated to achieve excellent performance.
- c) Ensuring problems are minimized and unavoidable problems are resolved with minimal disruption to the activities performed under the task order.
- d) Obtaining continuous feedback on performance from appropriate Government personnel and disseminating feedback to contractor personnel on all areas of task order performance.
- e) Continually monitoring the quality of all products and services provided for purposes of identifying and implementing performance improvements.
- f) Ensuring that all resources necessary to perform the task order are identified with clearly defined roles and deployed on schedule.

Support under this contract will include the following labor categories:

Labor Category	Education and Experience
Corporate Monitor	B.A./B.S. and (8) years of market research, marketing, communications, or consulting experience.
Project Director	Masters degree or equivalent professional degree in an associated field, and minimum of (10) years of related experience or an equivalent combination of experience and training that provides the required knowledge, skills, and abilities.
Sr. Project Manager	B.A/B.S. degree in business or other related discipline. A minimum of (12) years experience of which at least (7) years must be specialized in project development from inception to deployment and demonstrated capability in managing multi-task contracts and/or subcontracts of various types and complexity.
Project Manager	B.A./B.S. in business, media, computer science, marketing, or other related training.
Meeting Planner	B.A./B.S. or high school diploma with strong administrative skills and (2-4) years of relevant experience.
Jr. Meeting Planner	B.A./B.S. or high school diploma with strong administrative skills and (2-4) years of relevant experience.
Misc. Conference Planner	B.A./B.S. or high school diploma with strong administrative skills and (2-4) years of relevant experience.
Sr./Jr. Web Designer	Certification in web applications. Must have experience in Web site development. Must have experience in production management, web page





Labor Category	Education and Experience
	design, HTML and web graphics types and standards. Must have advanced experience with design-related applications including Macromedia and Adobe.
Sr./Jr. Web Developer	Certification in web applications. Must have experience in Web site development. Must have experience in web page design, HTML, and web graphics types and standards.
Computer Specialist	Must have minimum relevant experience and training that provides the required knowledge, skills, and abilities.
Word Processor	Must have relevant experience and training that provides the required knowledge, skills, and abilities.
Sr. Writer	B.A. in Journalism, Communication, English, or related field and (5-7) years of experience.
Jr. Writer	B.A. in Journalism, Communication, English, or related field and (3-4) years of technical/editing experience.
Editor	B.A. in Journalism, Communication, English, or related field and (5-7) years of technical/editing experience.
Subject Matter Expert	B.A./B.S. in Business, Marketing, Computer Science, Management, Communication, or related discipline and (5-10) years of relevant experience.
Proofreader	B.A./B.S. in a related discipline and (4-6) years of experience in the field.
Executive Administrative Asst.	B.A./B.S. in a related discipline and a minimum of (5) years of related experience or an equivalent combination of education and training that provides the required knowledge, skills, and abilities.
Clerk	B.A./B.S. degree or High School diploma and (2-3) years of strong administrative support or related field experience.
Production Assistant	B.A./B.S. degree or High School diploma and (3-4) years of strong administrative support or related field experience.
Graphic Artist/Designer	B.A./B.F.A. in design (e.g., graphics, marketing, or other discipline) with a minimum of (5) years of experience in graphics or advertising.
Translators	B.A./B.S. degree in an associated discipline or (2-4) years of relevant experience and accredited by the American Translators Association or other similar institution.
Warehouse Manager	B.A./B.S. or High School diploma with strong administrative skills and (4-8) years of relevant experience.





Labor Category	Education and Experience
Warehouse Labor (Gen)	H.S. diploma or its equivalent with (2-3) years of experience in the field or related area.
Skilled Labor (Gen)	H.S. diploma or its equivalent with (3-4) years of experience in the field or related area.
Unskilled Labor (Gen)	H.S. diploma or its equivalent with (1-2) years of experience in the field or related area.
Couriers	H.S. diploma or its equivalent with (2-3) years of experience in the field or related area.
Engineer	An equivalent combination of education and training that provides the required knowledge, skills, and abilities. Must have experience in Client Server or exposure to distributed architecture environment in the area of MIS or Web-based applications environment.
Data Analyst	Must have relevant experience and training that provides the required knowledge, skills, and abilities.
Senior Analyst	B.A./B.S. and a minimum of (7) years experience with (4) years supervisory responsibility.
Technician/Technician Staff	B.A./B.S. in Marketing, Media Services, Project Management and supported by a minimum of (4-7) years experience in a related field.
Strategic Planner	B.A./B.S. and/or (8-10) years of experience developing agenda for professional conferences and meetings. Experience in developing and implementing marketing plans and building exhibits.
Account Executive	B.A./B.S. in Accounting and (4-8) years experience as an Account Executive for Event Contracts.
Sr. Account Executive	M.S./B.S. in Accounting and (7-10) years experience as an Account Executive for Event Contracts.
Account Supervisor	B.A./B.S. and a minimum of (7) years experience with (4) years of supervisory responsibility.
Professional Trainer	B.A./B.S. or equivalent and (3-4) years of experience in the field or related area.
Call Center Staff	Must have relevant experience and training that provides the required knowledge, skills, and abilities.
Call Center Manager	Must have relevant experience and training that provides the required knowledge, skills, and abilities.





Labor Category	Education and Experience
Exhibit Designer	B.A./B.S. in an associated discipline and minimum of (2-3) years of related experience or equivalent combination of education and training that provides the required knowledge, skills, and abilities.
Misc. Exhibit Production Staff	B.A./B.S. in an associated discipline and minimum of (6) months of related experience or equivalent combination of education and training that provides the required knowledge, skills, and abilities.
Business Manager	B.A./B.S. and (8-10) years of Marketing, Communications, Account Management or Consulting experience.

Corporate Monitor

The Corporate Monitor provides leadership and oversight to the management and consulting division of the contractor. Other responsibilities include managing staff, project execution, contract compliance and deliverable schedules for division projects including media, marketing, graphics, Web site design, video production and other communication activities, outreach, market research, and analysis.

Project Director

The Project Director is responsible for planning, developing, implementing and evaluating overall program policies and directing subordinate managers/staff. The Project Director also directs and manages the operation of several programs/projects. Administration/management/monitoring responsibilities include, but may not be limited to: establishment of goals, objectives, performance requirements, standards, and accountability; administration of program costs, budget, and management and operation of programs.

Sr. Project Manager

The Sr. Project Manager serves as the project manager for large, complex task order (or a group of task orders affecting the same common/standard/migration system). The Sr. Project Manager must be able to assist the Program Manager in working with the Government Contracting Officer (CO), the contract-level Contracting Officer's Representative (COR), the task order-level COR(s), Government management personnel and customer agency representatives. Under the guidance of the Program Manager, the Sr. Project Manager will be responsible for the overall management of the specific task order(s) and insuring that the technical solutions and schedules in the task order are implemented in a timely manner.

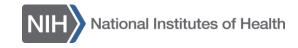
Project Manager

The Project Manager provides management of project activities, personnel and administrative functions related to specific tasks and ensures that technical solutions and schedules are implemented in a timely manner. The Project Manager is responsible for directing and managing staff assignments and monitoring product quality and ensuring project milestones meet deliverable schedules, as well as reporting on project status.

Meeting Planner

The Meeting Planner will be responsible for supervising on-site logistical support activities including room set-up, audiovisual requirements, managing logistical activities associated with planning and implementing meetings, conferences, trade show exhibits, and other events. The Meeting Planner will maintain close contact with the client project officer throughout event planning and implementation, negotiate site contracts for meetings, develop status and end-of-event reports clients, develop and maintain participant databases using meeting planning software such as Peopleware, and verify and reconcile host hotel and other contractor invoices.

Jr. Meeting Planner





The Jr. Meeting Planner will provide guidance to team members, assign exhibitor space, oversee booth set up, order booth furniture and required audiovisual equipment, and collect participant and exhibitor registration fees when applicable.

Misc. Conference Planner

The Misc. Conference Planner will coordinate and execute logistical requirements for meetings, conferences, and exhibits for government and private industry organizations.

Sr./Jr. Web Designer

The Sr./Jr. Web Designer will be responsible for directing and managing the design, development, and management of client web sites.

Sr./Jr. Web Developer

The Sr./Jr. Web Developer will be responsible for building web pages using a variety of graphical software applications, managing and performing Web site editorial activities, analyzing complex technical problems, developing and rendering solutions, developing site content, and aiding in all web projects involving desktop publishing and Web site design and development.

Computer Specialist

The Computer Specialist will review computer systems in terms of machine capabilities and man-machine interface. The Computer Specialist will also prepare functional requirements and specifications, as well as reports and studies concerning hardware.

Word Processor

The Word Processor provides administrative support for activities pertaining to software applications utilizing commercial database management systems. Responsibilities include user administration, data gathering, data retrieval, and manipulation.

Sr. Writer

The Sr. Writer will formulate and write copies for projects including fact sheets, project summaries, monthly progress reports, informational packets, press releases, publications and web content. He/She will also be responsible for providing technical writing, editing, and proofreading support for materials such as reports, news releases, fact sheets, web site text, and PSA scripts. The Sr. Writer will collaborate with Subject Matter Experts (SMEs), researchers, and graphic artists to produce documents.

Jr. Writer

The Jr. Writer will provide technical writing support for project deliverables, conduct research, identify subject matter experts, and conduct interviews. He/She will gather data, collate and organize facts for inclusion in written products, develop drafts and submit them for review, proofread copies generated by project team members and clients, and plan web and print products.

Editor

The Editor will be responsible for providing technical writing, editing, and proofreading support for materials such as reports, news releases, fact sheets, web site text, and PSA scripts.

Subject Matter Expert

The Subject Matter Expert must have experience in utilizing new methodologies for solving problems and ensuring that systems are in compliance with organizational requirements. He/She will analyze user needs to determine functional requirements, perform functional allocation to identify required tasks and their interrelationships, develop recommendations for organizational process changes to include new solutions and technology, and identify resources required for each task.





Proofreader

The Proofreader will review a variety of technical articles, reports, brochures, and/or manuals for documentation for a wide range of users. The Proofreader will typically report to a manager or head of a unit or a department.

Executive Administrative Assistant

The Executive Administrative Asst. will perform a variety of administrative functions for high level executives. The Executive Administrative Asst. must be familiar with a variety of field concepts, practices, and procedures. He/She will generate reports, handle multiple projects, and prepare and monitor invoices and expense reports. He/She may direct and lead the work of others. A wide degree of creativity and latitude is expected.

Clerk

Under supervision, the Clerk will be responsible for performing coding and filing of documents, demonstrating familiarity with basic office procedures, and operating office equipment (e.g., photo copier, facsimile, multi-line/voice systems, mailing machines, and minimal computer programs). Clerical duties often vary in type and sequence depending on the task at hand.

Production Assistant

The Production Assistant will provide document production support by operating computer or word processing equipment to compile, type, revise, combine, edit, print, and store documents.

Graphic Artist/Designer

The Graphic Artist/Designer will develop and design layouts across all mediums (print and electronic) that have a clear focus, theme, and message for intended audiences.

Translators

The Translators will provide translation of languages native to or otherwise able to interpret.

Warehouse Manager

The Warehouse Manager is responsible for providing an asset management system to monitor and track customer's office furniture and equipment inventory. He/She will also need to provide a physical inventory of furniture and furnishings, bar-coding services, including: developing bar code standards, bar-coding individual office items, and developing a bar code database. The Warehouse Manager will flow chart current processes and develop recommendations to improve processes. He/She will manage the process for the proper disposition of Federal Government property in accordance with applicable rules and regulations, if required.

Warehouse Labor (Gen)

The Warehouse Labor (Gen) performs duties specific to a warehouse including loading and unloading trucks and/or trailers, lifting and moving materials within a warehouse.

Skilled Labor (Gen)

The Skilled Labor (Gen) performs general labor tasks including loading, unloading, lifting, and moving materials. He/She must have experience operating heavy machinery in warehouses (i.e. Forklifts).

Unskilled Labor (Gen)

The Unskilled Labor (Gen) will be responsible for performing general labor tasks.

Couriers

The Couriers will provide services related to pick up and delivery of small to medium packages and letters.

Engineer





The Engineer will be responsible for performing systems programming work involving the maintenance and enhancement of computer systems and software. He/She may train personnel, develop and write user manuals, and write program and test specifications.

Data Analyst

The Data Analyst will provide highly technical expertise in the use of complex applications, evaluate and recommend available products to support validated user requirements, define file organization, indexing methods, and security procedures for specific user applications, and provide direct support to consultants and other senior personnel.

Senior Analyst

The Senior Analyst will be responsible for leading the design of project solutions and managing the project. He/She will serve as the primary point of contact with the client and will be the senior technical advisor. The Senior Analyst will provide strategic guidance in areas of formulating requirements, analyzing project proposals, recommending optimum approaches and developing system design. He/She will formulate specifications for developers to use in producing product deliverables.

Technician/Technician Staff

The Technician/Technician Staff will provide technical and procedural guidance and identify resources in support of market research, media analysis, and marketing planning.

Strategic Planner

The Strategic Planner is responsible for supervising management of event operations and developing event agendas. He/She will work closely with customers to develop and implement marketing plans. The Strategic Planner will also work with logistics coordinators, accounting coordinators, and data coordinators to develop event work plans.

Account Executive

The responsibilities of the Account Executive include, but are not limited to, recording financial transactions related to account receivables and account payables, reconciling event accounts with clients, and preparing timely financial reports.

Sr. Account Executive

The responsibilities of the Sr. Account Executive include, but are not limited to, reviewing and approving transactions conducted and performed by the Jr. and Sr. Account Representatives, certifying ledger accounts, authenticating financial reports, and conducting financial audits.

Account Supervisor

The primary responsibilities of the Account Supervisor include, but are not limited to, supervising Jr. Account Representatives, overseeing processing of related account receivables and account payables, and preparing financial audits. The Account Supervisor will report to the Sr. Account Executive.

Professional Trainer

The Professional Trainer will train personnel by conducting formal classroom courses, workshops and seminars. He/She will prepare instruct materials, develop and revise courses and prepare appropriate training catalogs. The Professional Trainer will be responsible for preparing student materials (training aids, course outlines, workbooks, handouts, completion certificates, and course critique forms).

Call Center Staff

The Call Center Staff will serve as the initial point of contact for troubleshooting hardware/software PC and Printer problems.



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Call Center Manager

The Call Center Manager will provide daily supervision and direction to staff that are responsible for Telephone and in-person support to users in the areas of E-Mail, Directories, and Std. Windows Desktop Applications. The Call Center Manager will provide first point-of-contact troubleshooting for hardware/software, PC, and printer problems, and will maintain documentation of help desk activities.

Exhibit Designer

The Exhibit Designer will make all necessary arrangements for exhibits in venues (Tradeshows, Government agencies, Malls, etc.). The Exhibit Designer's responsibilities include, but are not limited to, conceptualizing, designing and producing exhibits and their accompanying materials, shipping exhibit property to and from designated site(s), media illumination services, providing and/or making recommendations for carpet and padding installation of exhibit property, cleaning, prepping, and storing exhibit property for future use.

Misc. Exhibit Production Staff

Under the supervision of the Exhibit Designer, the Misc. Exhibit Production Staff will prepare facilities for receiving materials associated with exhibit layouts, interact with facility personnel in coordinating booth assignments, lighting, telecommunications, security, and storing of exhibit property.

Business Manager

The Business Manager will be responsible for providing support in the areas of Client Services and Customer Relations. He/She will serve as the liaison between Corporate Staff and Project Staff.

1.3 Contract and Task Order Management

Contract and task order management is a mandatory element for all task orders placed under the PICS contract vehicle. The objective of contract and task order management is to provide the program management, project control, and contract administration support needed to manage a high volume, multiple contract task order process.

The application of processes that support task order management are encouraged to ensure that cost, schedule, and quality requirements of each order are tracked, communicated to the government, and ultimately attained.

1.4 Principal Task Areas

The following categories will cover the total scope of services for the PICS contract:

- Communications and Outreach Support
 - Communications Research (Task Area 1)
 - Media Analysis and Outreach (Task Area 2)
 - Outreach and Promotion Activities (Task Area 3)
 - Press, Public Information, Integrated Marketing, and Media Support (Task Area 4)
 - Outreach to Target Populations/Health Disparities Programs (Task Area 5)





- Foreign Language, Translation, and Interpretation (Task Area 9)
- Media Crisis Communication Training (Task Area 10)
- Information Referrals ("Clearinghouses") (Task Area 11)
- Materials Development and Distribution Support
 - Materials and Product Development (Task Area 6)
 - Inventories / Warehouse / Distribution Services (Task Area 18)
 - Cost-Recovery Support and Services (Task Area 19)
- Graphic Design, Web, and Database Support
 - Graphic Design (Task Area 7)
 - Web Design, Development, and Management (Task Area 8)
 - IT Requirements (Task Area 14)
 - Security (Task Area 14b)
 - o Database and Web Design, Development, and Management (Task Area 15)
 - Information Tracking and Referral (Task Area 16)
 - Website Usability Testing (Task Area 17)
- Exhibit and Conference Support
 - Exhibit Development, Design, Production, and Transport (Task Area 12)
 - Meeting, Conference, and Event Support (Task Area 13)

1.4.1 Communications and Outreach Support

1.4.1.1 Communications Research (Task Area 1)

Contractors are able to provide the Government the full range of communications and social marketing research services. These services may include the review of current literature and the development of research strategies, designs, and methods of analysis.

Contractors are able to design, develop, and deliver a wide range of strategic communication programs including:

Integrated marketing and evaluation services;





- Logo, slogan, message, and tagline development and branding;
- Development of shared resources;
- Market segmentation research;
- Focus group and audience testing;
- Events and meetings for media and strategic communication programs;
- Design and execution of Federally-approved surveys; and
- Evaluation of agency communication programs.

For additional information regarding the type of work included under Communications Research (Task Area 1), please refer to the Statement of Work.

1.4.1.2 Media Analysis and Outreach (Task Area 2)

Contractors are able to furnish all necessary staff, equipment, and professional expertise to help NIH meet the specific media requirements of outreach programs. Contractors are able to design, develop, and, execute detailed media strategies for reaching desired targets.

For additional information regarding the type of work included under Media Analysis and Outreach (Task Area 2), please refer to the Statement of Work.

1.4.1.3 Outreach and Promotion Activities (Task Area 3)

Contractors are able to design and execute a range of comprehensive communication and recruitment efforts targeted to specific audiences in support of the NIH outreach mandate as specified in task orders. Contractors are able to furnish all necessary goods and services, including professional consulting services, advice, and expertise required for the production of communication programs and activities including education, prevention, recruitment, and awareness efforts designed to inform the broad public spectrum and target audiences about health, scientific, and medical findings.

For additional information regarding the type of work included under Outreach and Promotion Activities (Task Area 3), please refer to the Statement of Work.

1.4.1.4 Press, Public Information, Integrated Marketing, and Media Support (Task Area 4)

Contractors are able to furnish a wide range of professional consulting services, advice, and expertise in organizing and assisting NIH in its many and varied outreach activities. Contractors have demonstrated experience developing, maintaining, updating, and expanding Federal outreach initiatives and initiatives aimed at reaching desired target audiences.

For additional information regarding the type of work included under Press, Public Information, Integrated Marketing, and Media Support Services (Task Area 4), please refer to the Statement of Work.

1.4.1.5 Outreach to Target Populations/Health Disparities Programs (Task Area 5)

Contractors are able to design, test, execute, and evaluate communication and recruitment efforts designed to reach desired target audiences. Contractors are able to furnish all necessary professional





consulting services and expertise for the development, execution, and evaluation of NIH communication and recruitment efforts.

For additional information regarding the type of work included under Outreach to Target Populations/Health Disparities Programs (Task Area 5), please refer to the Statement of Work.

1.4.1.6 Foreign Language, Translation, and Interpretation (Task Area 9)

Translation and interpretation may be required as part of specific tasks outlined in this contract. Contractors are able to translate a wide range of communication products, including publications, reports, correspondence, and campaign-related materials.

For additional information regarding the type of work included under Foreign Language, Translation, and Interpretation (Task Area 9), please refer to the Statement of Work.

1.4.1.7 Media and Crisis Communication Training (Task Area 10)

Contractors are able to furnish a wide range of media and crisis communication training programs for designated spokespersons and staff members in both individual and group settings.

For additional information regarding the type of work included under Media and Crisis Communication Training (Task Area 10), please refer to the Statement of Work.

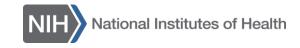
1.4.1.8 Information and Referrals ("Clearinghouses") (Task Area 11)

NIH disseminates health, medical, and scientific research findings related to advances in prevention, diagnosis, treatment, behavioral response, awareness, and other health improvement opportunities. NIH accomplishes this in part through a network of information clearinghouses that serve to ensure and promote greater improvements in health outcomes across all communities and the general public. These clearinghouses are a critical component of the NIH public education mission.

Contractors are able to implement, operate, and maintain fully-operational information centers for the Government. Inquiries may range from simple questions and publication fulfilment orders to complex and technical questions. Contractors will be required to furnish all necessary facilities, equipment, supplies, goods, services, and qualified labor needed by the Government for the accomplishment of this effort.

Clearinghouse sources will include at a minimum the Internet, libraries and library systems, databases, and Government-vetted textbooks, journals, and professional resources. Contractors will be required to procure all requisite supplies and services, including but not limited to software programs and subscriptions to journals, magazines, newspapers and other media for support of Government communication programs.

For additional information regarding the type of work included under Information and Referrals ("Clearinghouses") (Task Area 11), please refer to the Statement of Work.



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1.4.2 Materials Development and Distribution Support

1.4.2.1 Materials and Product Development (Task Area 6)

Contractors are able to provide a full range of writing and editorial service including writing, proofreading, revising, copy editing, technical editing, and senior-level editing in support of the development of high-quality publications and materials required by the NIH.

Contractors are able to design and execute all aspects of electronic, digital, and/or Web-based media including CD-ROMs, DVDs, Blogs, Webcasts, Podcasts, and social media profiles.

Contractors are able to design, develop, execute, duplicate, and furnish high-quality, culturally competent health, medical, and scientific information including fact sheets, brochures, information sheets, posters, flyers, exhibits, newsletters, campaign materials, responses to inquiries, and Web content.

For additional information regarding the type of work included under Materials and Product Development (Task Area 6), please refer to the Statement of Work.

1.4.2.2 Inventories / Warehouse / Distribution Services (Task Area 18)

Contractors are able to manage a full range of inventory control services including receiving, cataloging, storing, tracking, maintaining, and shipping communication materials. NIH may require contractors to negotiate, establish, procure, and maintain postal boxes for contractor receipt of official Government mail.

Contractors are able to furnish the full range of mailing services including generating mailing labels; preparing publications for bulk or mass mailings; fulfilling individual piece mailings; and labelling and preparing mailing materials for the timely, accurate, complete, and successful accomplishment of the Government's mailing and transport requirements.

Contractors are able to provide clean, safe, climate-controlled, and organized warehouse space and staff to organize and store large quantities of inventory items. Examples of items to be inventoried, stored, and transported include current and archived publications, exhibits, tapes, archived materials, artwork, and exhibits. NIH may require contractors to undertake and complete physical inventory counts.

Contractors are able to transport materials by courier between agency facilities and other venues in the consolidated Greater Baltimore-Washington Metropolitan Area and may be required to arrange and handle overnight delivery through one or more firms specializing in such services. Contractors are able to provide all necessary machinery, equipment, and staffing, including handcarts, electric pallet jacks, forklifts, and currently licensed staff for operating machinery as required for the execution of this task.

Contractors are able to provide a wide range of duplication services to the Government, including high-speed, high-volume, and color output equipment for timely, accurate, high quality duplication, production, and mailing of materials. Contractors are able to furnish all necessary staffing, labor, and services required to accomplish large-scale reproduction, including duplication, collation, assembly, mailing, and distribution of agency materials and products.





For additional information regarding the type of work included under Inventories / Warehouse / Distribution Services (Task Area 18), please refer to the Statement of Work.

1.4.2.3 Cost-Recovery Support and Services (Task Area 19)

Any and all Government materials may be subject to a cost-recovery fee, quantity limitation, or controlled distribution. Contractors are able to handle payments for Federal cost-recovery programs as part of a Federal program operation.

For additional information regarding the type of work included under Cost-Recovery Support and Services (Task Area 19), please refer to the Statement of Work.

1.4.3 Graphic Design, Web, and Database Support

1.4.3.1 Graphic Design (Task Area 7)

Contractors are able to provide a full range of high-quality, visually attractive graphic design services. Contractors are able to coordinate product development with the NIH to ensure that Federal standards and expectations are met and that any and all products confirm to the desired specifications.

For additional information regarding the type of work included under Graphic Design (Task Area 7), please refer to the Statement of Work.

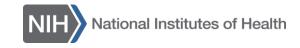
1.4.3.2 Web Design, Development, and Management (Task Area 8)

Contractors are able to consult with and coordinate efforts with Federal IT and Program Office staff to design, develop, troubleshoot, evaluate, refine, re-design, and test Web sites and ancillary Web-based products.

Contractors are able to perform a range of responsibilities related to on-going management and maintenance of Federal Web sites, specifically:

- Reviewing and updating Web sites regularly for problems, errors, inaccuracies, non-functionality and compliance with applicable standards, guidelines, and regulations;
- Producing accurate, well-written and designed, error-free Web content and ensure that Federal Web sites remain accurate, up-to-date, and accessible at all times;
- Remaining current on new and emerging technologies and approaches that may apply to Federal Web sites and the virtual environment;
- Proactively proposing and implementing forward-thinking improvements and enhancements for the Federal Government's Web sites:
- Complying with IT systems security and privacy specifications set forth by the Government, and
- Establishing and implementing appropriate administrative, technical, and physical safeguards to ensure the security and confidentiality of sensitive Government information, data, and equipment.

For additional information regarding the type of work included under Web Design, Development, and Maintenance (Task Area 8), please refer to the Statement of Work.



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1.4.3.3 IT Requirements (Task Area 14)

The Government anticipates that NIH will require a wide range of ancillary IT-related goods and services required under task order contracts awarded in this effort for presentation purposes. Examples of deliverables include event registration Web sites, speaker presentations, press kits, inquiries tracking databases, cost-recovery systems, reports, and health, scientific, and medical information in all media formats.

For additional information regarding the type of work included under IT Requirements (Task Area 14), please refer to the Statement of Work.

1.4.3.4 Security (Task Area 14b)

IT-related tasks in service orders awarded under this effort will require a Federal security clearance and background check. The Government requires contractors to (1) have in place a number of safeguards and procedures in support of agency operations and assets and (2) to develop, document, implement, and otherwise contribute to agency-wide information security programs designed to safeguard information and information systems.

The Government may also require additional security controls such as:

- Federal Desktop Configuration Controls;
- Security Awareness Training;
- Access to the contractor's physical location and/or logistical access to any hosting facility and the Certification and Accreditation of any and all Government systems regardless of location.

For additional information regarding the type of work included under Security (Task Area 14b), please refer to the Statement of Work.

1.4.3.5 Database and Web Design, Development, and Management (Task Area 15)

Contractors are able to design, develop, maintain, troubleshoot, refine, test, and implement databases, technologies, applications, products, and systems for compiling, storing, analyses, and managing data.

Contractors are able to provide strategies/implementation plans to improve and build upon existing databases, technologies, applications, products, and systems; investigate and price potential new approaches; and provide technical expertise and feedback to Government staff.

For additional information regarding the type of work included under Database and Web Design, Development, and Management (Task Area 15), please refer to the Statement of Work.

1.4.3.6 Information Tracking and Referral (Task Area 16)

Contractors are able to design, develop, and maintain fully-functional, state-of-the-art mechanisms, procedures, and systems for use in tracking mentions of each agency or in reporting specific issues and topics that appear in the media or elsewhere as required. Items that merit attention will be forwarded to Government personnel for action and approval.





For additional information regarding the type of work included under Information Tracking and Referral (Task Area 16), please refer to the Statement of Work.

1.4.3.7 Website Usability Testing (Task Area 17)

Contractors are able to provide Web site usability evaluation and testing to ensure that Governmentand Government-supported Web sites are (1) well-engineered and accessible to the Government's many diverse audiences and (2) comply with required accessibility and usability standards.

For additional information regarding the type of work included under Website Usability Testing (Task Area 17), please refer to the Statement of Work.

1.4.4 Exhibit and Conference Support

1.4.4.1 Exhibit Development, Design, Production, and Transport (Task Area 12)

Contractors are able to design, develop, and furnish meeting and campaign-related exhibits and displays. Contractors are able to provide a full range of services required for production of meeting and exhibit-related materials, including newsletter and presentation design and production. Contractors are able to assemble, prepare, and ship exhibit materials for display and distribution at health, medical, and scientific meetings and events.

For additional information regarding the type of work included under Exhibit Development, Design, Production, and Transport (Task Area 12), please refer to the Statement of Work.

1.4.4.2 Meeting, Conference, and Event Support (Task Area 13)

Federal agencies require a full range of meeting-related services, including initial concept development, early planning (e.g., agenda development, venue selection, reservations, budgeting, event file establishment and maintenance); graphic design support (e.g., signage and materials production); participant correspondence; registration; travel and guest services; audiovisual requirements; meals and hospitality; message center of operation; and post-event services.

For additional information regarding the type of work included under Meeting, Conference, and Event Support (Task Area 13), please refer to the Statement of Work.

1.5 Task Orders

All requirements will be fulfilled under task orders (TOs). The task order will provide detail of the specific services that will be required. Task orders may be Fixed-Price, Time and Materials, or Labor Hour type contracts.

Though Fixed Price type task orders are preferred, Time and Materials and Labor Hour are permitted but require a signed Determinations and Findings (D&F) report. If the task order is in excess of 3 years, the D&F must be signed by the NIH Head of Contracting Activity. T&M should only be used if Fixed-Price is not suitable.



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1.6 PICS Resources

There are PICS resources available to help work with this vehicle, including an informational Web site located at http://PICS.olao.od.nih.gov and a PICS Program Support Team that can be reached at PICS1@mail.nih.gov.

1.7 Classified Material

Task Order Request Packages (TORPs) will contain only unclassified material, regardless of the level of classification of the work to be performed under the task order.

The Task Order Team is responsible for ensuring that proprietary information contained in the contractors' proposals is protected from unauthorized disclosure. It is the contractors' responsibility to ensure that all proprietary information is appropriately marked.

1.8 Supporting Documentation Submission

The preferred channel for delivery of all correspondence to the PICS Contracting Officer is electronic via e-mail (PICS1@mail.nih.gov). Microsoft Word (.doc or .docx) is the preferred format for all text documents. All spreadsheets should be submitted in Microsoft Excel (.xls or xlsx) format.

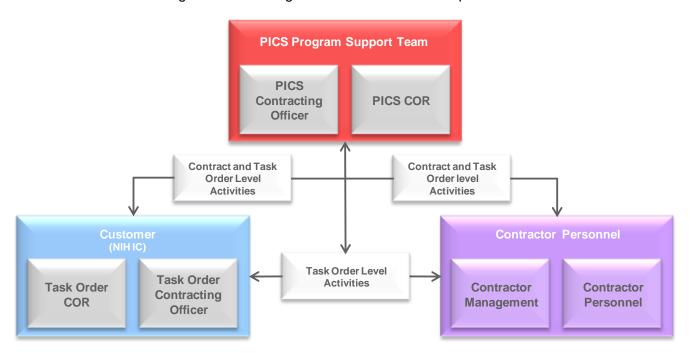


2 ROLES AND RESPONSIBILITIES

The primary roles supporting the PICS contracts and task orders on behalf of the NIH are:

- PICS Program Support Team
 - PICS Contracting Officer (CO)
 - PICS Contracting Officer's Representative (COR)
- Customer (NIH IC)
 - Task Order Contracting Officer (CO)
 - Task Order Contracting Officer's Representative (COR)

Specific representatives involved will play a significant role in the maintenance of the PICS contracts as well as the initiation, award, administration, tracking, and close-out of each task order. Responsibilities are outlined in the following sections and again later in the task order procedures.



2.1 PICS Program Support Team

The Office of Logistics and Acquisition Operations (OLAO) has established the PICS Program Support Team to provide contract-level **management and oversight for the PICS contract vehicle**. The PICS COR has been designated to oversee and manage the contracts with support from the PICS CO. While individual task orders will include guidelines specific to the performance of the requirements of that task





order, the overall contractual relationship between customers and contractors is maintained by the PICS Program Support Team.

2.1.1 PICS Contracting Officer



PICS Contracting Officer

PICS Contracting Officer

Role: OLAO representatives who can negotiate changes to the Statement of Work (SOW), delivery schedule, and Period of Performance for the PICS contract vehicle. Act as the Point of Contact (POC) for contractual issues.

Primary Responsibilities:

- Review and approve TORPs submitted by customers
- Release approved TORPs to vendors
- Coordinate and liaison between vendors and customers
- Announce task orders awards

The PICS CO has the authority to act as an agent of the Government under the PICS contracts. Only the PICS CO has authority to:

- serve as the primary point of contact for the PICS contracts
- direct or negotiate any changes in the Statement of Work or specifications of the PICS contracts;
- modify or extend the period of performance;
- change the delivery schedule;
- otherwise change any terms and conditions of the contracts;
- concur with any exceptions to the fair opportunity process; and
- perform contract administration duties such as exercising option years and contract close-out functions.

Other responsibilities of the PICS CO include, but are not limited to:

reviewing TORPs and releasing TORPs to all contractors;





- serving as the primary point of contact for contractual issues related to the PICS contracts;
- concurring on Selection Recommendation Documents (SRDs); and
- announcing task orders awards.

2.1.2 PICS Contracting Officer's Representative (COR)



PICS Contracting Officer's Representative (COR)

Role: Support the PICS Contracting Officer by monitoring the technical progress of the contractors and assisting in the resolution of technical problems.

PICS COR

Primary Responsibilities:

- Log and maintain task order records
- Track and guide contract performance over the life of the PICS contracts

The PICS COR will act as the PICS Contracting Officer's Representative for the purpose of the PICS contract vehicle. The PICS COR is responsible for:

- monitoring the contractors' technical progress, including the surveillance and assessment of performance;
- recommending changes in requirements to the PICS CO;
- interpreting the Statement of Work and any other technical performance requirements;
- performing technical evaluations as required;
- performing technical inspections and acceptance required by this contract; and
- assisting in the resolution of technical problems encountered during performance.

Other responsibilities of the PICS COR include, but are not limited to:

- logging and maintaining records of all task orders; and
- tracking and guiding contract performance over the life of the PICS contract vehicle.

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2.2 Customer (NIH IC)

Task orders will be used to define and obtain services under the PICS contract vehicle. Each task order is expected to have differing requirements based on the unique needs of the customer. The roles listed below describe those who will be responsible for the **procurement and oversight of task orders**. Individuals in these roles are considered to be "customers" of the PICS contract vehicle.

2.2.1 Task Order Contracting Officer (CO)

The Task Order Contracting Officer (CO) will have the authority to act as an agent of the Government under a particular task order. The Task Order CO would be a warranted CO from the respective Consolidated Operations and Acquisitions Center (COAC) or, when applicable, from their ordering office.



Task Order Contracting Officer

Task Order Contracting Officer (CO)

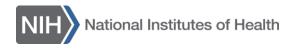
Role: The Task Order CO will have the authority to act as an agent of the Government under a particular task order and have the right to negotiate changes to the Statement of Work. The Task Order CO will support the Task Order COR through the task order process.

Primary Responsibilities:

- Submit TORP to PICS CO and COR
- Assist in the task order proposal evaluation
- Monitor and assess task order performance
- Responsible for all pre-award, award, administration, and close-out activities

The Task Order CO has authority to:

- direct or negotiate any changes in the Statement of Work or specifications of a task order;
- modify or extend the period of performance of the task order; as long as the completion
 of the task order period of performance is within 12 months after the base contract
 expires;
- change the delivery schedule;
- otherwise change any terms and conditions of a particular task order; and
- obtain approvals for exceptions to the fair opportunity process.





Additional responsibilities of the Task Order CO include:

- taking responsibility for all pre-award, award, administration, and closeout of an individual task order;
- submitting the TORP to the PICS CO and COR;
- executing the determination and findings (D&F) per FAR 16.602 for each task order awarded on a time and materials (T&M) or labor hour (LH)basis;
- overseeing the Task Order COR evaluation of proposals;
- approving the Selection Recommendation Document (SRD);
- processing and awarding a task order;
- processing and awarding modifications to the task order;
- monitoring and assessing the contractor's task order performance;
- approving of final deliverables and/or statement that the work has been completed in accordance with the task order statement of work; and
- performing close-out tasks.

2.2.2 Task Order Contracting Officer's Representative (COR)

The Task Order COR must be FAC-COR certified and is responsible for all technical aspects of the task order. The Task Order COR will typically be the individual requiring the services offered under the PICS contract vehicle, but may be a designee within the IC requiring the service. The Task Order COR will represent the Government as the main interface between the program office and the contractor during the delivery of services.





<u>Task Order Contracting</u> <u>Officer's Representative (COR)</u>

Role: The individual requiring PICS contract services and represents the Government as the main interface between NIH and the contractor during the delivery of services.

Task Order COR

Primary Responsibilities:

- Develop TORP
- Monitor the contractor's task order progress
- Interface with contractor management staff
- Complete contractor performance evaluation

The Task Order COR is responsible for:

- monitoring the contractor's technical progress on a task order;
- interpreting the Statement of Work (SOW) and any other technical performance requirements of a task order;
- providing direction to the contractor's management staff to facilitate task order performance;
- performing technical inspections and acceptance required by a task order;
- monitoring performance during the period of performance of the task order;
- assisting in the resolution of technical problems encountered during performance; and
- completing final contractor performance evaluations

Other responsibilities of the Task Order COR include, but are not limited to:

- developing the TORP;
- evaluating the technical and business proposals;
- preparing the Selection Recommendation Document (SRD) for Task Order CO approval;
- acceptance of final deliverables and/or statement that the work has been completed in accordance with the task order statement of work; and





• performing the Close-out tasks.



3 TASK ORDER GUIDELINES

Task orders are issued to procure services under the PICS contract vehicle. This section describes the details of the task order creation, solicitation, award, administration, and closeout.

The PICS award mechanism will operate using the PICS electronic Government Ordering System (eGOS), when available and implemented. This SOP will be updated at that time to provide specific, streamlined guidance on how to use eGOS in placing a task order.

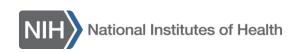
<u>Task Order Guidelines are subject to change</u>; refer to latest version in effect. The latest version will supersede all earlier versions.

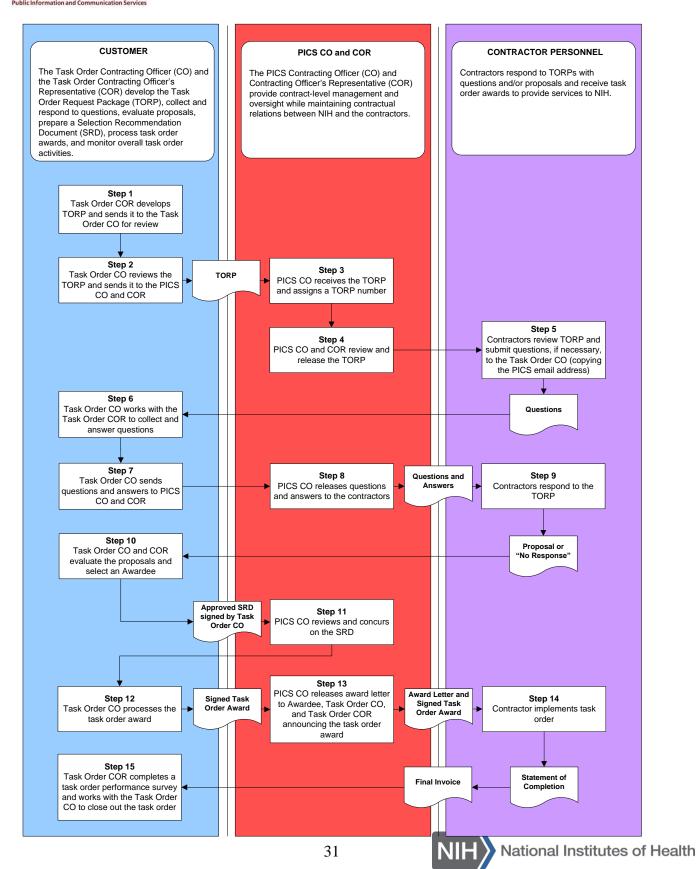
Please refer to the PICS Website at http://PICS.olao.od.nih.gov/ and/or contact the PICS Program Support Team (PICS1@mail.nih.gov) for additional information.

In accordance with Federal Acquisition Streamlining Act (FASA) and Federal Acquisition Regulation (FAR), Part 16.505(b), each contractor will be provided a fair opportunity to be considered for each order in excess of \$3000 unless one of the exceptions stated in FAR 16.505(b)(2) applies.

The required channel for delivery of all correspondence to the PICS Contracting Officer is electronic via e-mail (PICS1@mail.nih.gov). Microsoft Word is the preferred format for all text documents. All spreadsheets should be submitted in Microsoft Excel.

The figure below charts the Task Order Process Flow from initiation of the requirement through task order close-out, mapping each step to the party primarily responsible for completing the required activities. A more detailed description of the activities occurring at each step is provided in subsequent sections of these guidelines.





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3.1 Step 1 - Task Order Contracting Officer's Representative (COR) develops TORP

When NIH determines a need exists for communication services, a Task Order COR will first be identified. The Task Order COR may or may not be the requestor for services, but must be FAC-COR certified. Before creating a Task Order Request Package, the Task Order COR and CO should review the PICS Contract. The Task Order COR will create a TORP using the TORP form.

The **TORP** will include (1) a Statement of Work (SOW), (2) the estimated period of performance, (3) any applicable Government Furnished Property (GFP), (4) evaluation criteria (criteria may include management approach; experience in national, Federal health programs; personnel and organizational strength; understanding of the work and technical objectives; quality of work products; quality of facilities, equipment, and supplies; and cost/price), (5) Independent Government Cost Estimate (IGCE) (not released to contractors), (6) funding document, and (7) all required clearances (if any).

TORP

- Completed TORP Form
- Statement of Work
- Independent Gov't Cost Estimate
- Funding Document

The TORP will include:

- 1) a Statement of Work (SOW)
- 2) the anticipated period of performance
- 3) any applicable Government Furnished Property (GFP)
- 4) evaluation criteria
- 5) a procurement sensitive Independent Government Cost Estimate (IGCE) (not released to contractors)
- 6) funding document
- 7) any clearances

The Task Order COR will submit the TORP to the Task Order CO for review.

3.2 Step 2 - Task Order CO reviews TORP

Upon review and acceptance, the Task Order CO will send the TORP to the PICS CO and COR for review using the PICS Program Support Team e-mail (PICS1@mail.nih.gov).

3.3 Step 3 - PICS CO receives the TORP and assigns a TORP number

The PICS CO will assign the TORP an official number prior to review. The TORP number will serve as the task order tracking number. When submitting or sending any documents or e-mails, the Task Order CO shall reference the TORP number (e.g., subject line for e-mails, headers for documents).



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3.4 Step 4 - PICS CO and COR review and release the TORP

The PICS CO and COR will review the TORP for completion and scope. Any issues with the TORP will be resolved with the Task Order CO and COR. After review and approval, the PICS CO will release the TORP to all contractors via e-mail and copying the Task Order COR and Task Order CO. The TORP does not commit NIH to pay any costs incurred in the submission of any proposal, nor does it commit NIH to award a task order for such services. NIH intends for each TORP to be negotiated into a resulting task order; however, there is no guarantee that a task order will be issued in every case.

3.5 Step 5 - Contractors review TORP and submit questions if necessary

Upon receipt of the TORP, all contractors will have the opportunity to review the requirement and submit questions requiring clarification. Contractors shall submit all questions to the Task Order CO and COR via e-mail (copying the PICS email address PICS1@mail.nih.gov) by the date indicated in the TORP.

3.6 Step 6 - Task Order CO works with the Task Order COR to prepare responses to questions

The Task Order CO will work with the Task Order COR to sufficiently respond to any questions submitted by the contractors. Technical related questions will be answered by the Task Order COR; contractual questions will be answered by the Task Order CO.

3.7 Step 7 - Task Order CO sends questions and answers to the PICS CO and COR

All questions and answers will be compiled by the Task Order CO and sent to the PICS CO and COR via the PICS e-mail address (PICS1@mail.nih.gov).

3.8 Step 8 - PICS CO releases questions and answers to the contractors

Questions and answers will be released simultaneously to all contractors by the PICS CO.

3.9 Step 9 - Contractors respond to the TORP

Each contractor will have the opportunity to review the requirement, any provided questions and answers, and determine whether or not to submit a proposal. The contractors shall submit a proposal or a "No Response" statement in response to the TORP.

3.9.1 Proposals

Proposals shall be submitted electronically via e-mail to the Task Order CO and COR, copying the PICS e-mail address (<u>PICS1@mail.nih.gov</u>). Oral proposals will not be accepted. Proposals will consist of two parts: a technical proposal and a business proposal. The contractors shall prepare a proposal with as much detail as requested by the TORP. Please note that these proposals may be quite brief





unless additional information is required. If price/cost is the only evaluation factor listed, award will be made to the lowest price.

Vendor Proposal

- Technical Proposal
- Business Proposal

Proposals must be submitted electronically via email; oral proposals will not be accepted.

Proposals will consist of two parts: a technical proposal and business proposal

Technical Proposals shall sufficiently respond to all elements of the TORP.

Business Proposals shall include an estimated ceiling (not to exceed) amount specifying labor and other related fees and expenses. Contractors shall propose a specific handling charge percentage for that task order. The hourly rates for the proposed task order labor categories may not exceed, but may be less than, the rates stated in the associated PICS contract. All proposed rates are subject to review by the PICS CO for compliance with the associated PICS contract.

The contractors will ensure that all proprietary information is appropriately marked within the proposals.

3.9.2 "No Response" Statements

A "No Response" statement shall be submitted if a contractor is unable or otherwise cannot perform a requirement. This shall be submitted electronically via e-mail to the Task Order CO and COR copying the PICS e-mail address.

All **"No Response" statements** shall include a brief statement as to why the contractor has elected to forego the opportunity.



No Response Statement

A "No Response" statements shall be submitted if a contractor is unable or otherwise cannot perform a requirement.

All "No Response" statements shall include a brief statement as to why the contractor has elected to forego the opportunity.

3.10 Step 10 - Task Order CO and Task Order COR evaluate the proposals and select an Awardee

The Task Order CO and Task Order COR will evaluate the contractors' technical and business proposals. It is the responsibility of the Task Order CO and Task Order COR to ensure that contractors are treated equitably and fairly during this evaluation process.

The Task Order CO and Task Order COR are responsible for ensuring that proprietary information contained in the contractors' proposals is protected from unauthorized disclosure.

After completion of the evaluation, negotiations are conducted, and any revised proposals evaluated. After selection of the Awardee, the Task Order COR will complete a Selection Recommendation Document (SRD) describing the review process and detailing the reason that award to the recommended contractor is in the best interest of the Federal government in accordance with FAR 16.505(b). An SRD template may be found on the Resources page of the PICS Website (http://PICS.olao.od.nih.gov).

The SRD must include (1) the selection criteria/methodology for evaluating submitted proposals as originally defined in the TORP package, (2) a list of the contractors that responded to the TORP, (3) rationale for the recommendation of the task order Awardee, including a summary of evaluation results, any negotiations conducted, price analysis, and award analysis (rationale for the recommendation of the Awardee), and (4) signature of the Task Order CO.

The Task Order CO will forward the SRD to the PICS CO (via the PICS e-mail PICS1@mail.nih.gov) for review and concurrence.



Selection Recommendation Document (SRD) The Selection Recommendation Document (SRD) will include:

- 1) the selection criteria for evaluating submitted proposals as originally defined in the TORP package
- 2) list of contractors that responded to the TORP
- 3) evaluation results and rationale for the recommendation of the awardee
- 4) Task Order Contracting Officer signature

3.11 Step 11 - PICS CO reviews and concurs on the SRD

After reviewing and concurring with the SRD, the PICS CO will notify the Task Order CO via e-mail to begin processing the task order award.

3.12 Step 12 - Task Order CO processes the task order award

Per NIH acquisition rules, no task order released under this vehicle can be awarded as a standalone contract or purchase order.

The task order will contain:

- contract number (for the PICS contractor selected),
- task order number,
- order date,
- point of contact for billing purposes,
- statement of work (SOW),
- appropriation/funding citation,
- amount of funds obligated,
- billing and delivery addresses, and
- period of performance.





The Task Order will contain:

- (1) contract number
- (2) task order number
- (3) order date
- (4) billing point of contact
- (5) statement of work (SOW)
- (6) appropriation/funding citation
- (7) amount of funds obligated
- (8) billing and delivery addresses
- (9) period of performance

NIH customers will work in conjunction with their respective COAC to process an OF-347 Purchase Order Form. A copy of the signed OF-347 must be provided to the PICS CO the same day the award is signed by the Government.

The Task Order CO and Task Order COR should establish and maintain a task order file containing, at a minimum, all pre-award documentation/proposals/approvals, awarded task order, task order administration documents and correspondence, modifications and supporting documentation, invoices, performance evaluations, closeout documents, and any other documents/correspondence relative to each individual task order.

3.13 Step 13 - PICS CO releases the award letter

The PICS CO will release the signed task order award document along with an award letter to the Awardee and Task Order CO and Task Order COR announcing the task order award.

3.14 Step 14 - Contractor implements the task order

The contractor is authorized to start work on the period of performance start date indicated in the task order award document.

The contractor will submit all task order invoices to the billing address indicated in Article G.4 (Invoice Submission) of their PICS contract. All invoices shall include both current and cumulative billing and clearly cite the funds remaining. The Task Order COR is responsible for reviewing/approving these invoices and ensuring that appropriate receiving is entered.

3.15 Step 15 - Task order close-out

After the Task Order has expired, the contractor must submit a Task Order Close-Out form to the Task Order COR who will, in conjunction with the Task Order CO, assess the quality of services received by completing a performance survey (available on the PICS Website at http://PICS.olao.od.nih.gov), and ensure that all task order requirements were met. The Task Order CO will send the performance survey and a copy of the final Close-Out form to the PICS CO via e-mail.





The contractor shall also submit the final invoice to the Task Order COR including a statement indicating that all costs have been accounted for and billed. The contractor shall forward a copy of the final invoice to the PICS CO when the task order has been completed.

3.16 Task Order Award Timelines

Task order award timelines are largely dependent on the specific requirement. The timeline for the PICS Program Support Team to review and release the TORP to contractors (Task Order Steps 3-4 from above) is targeted to be approximately five (5) business days. Task orders with special requirements or complex requirements may take longer. This processing time begins once a complete, acceptable TORP is received by the PICS Contracting Officer. Incomplete or unacceptable TORPs will require additional time for the PICS Contracting Officer to advise the Task Order CO on minimum acceptable requirements.

Task Order COR in consultation with the Task Order CO will establish a TORP response time that will afford contractors a reasonable opportunity to respond to the requirement. When establishing the TORP response time, Task Order COR and Task Order CO will consider the circumstances of the individual acquisition and account for factors such as the complexity, availability, and value of the requirement.



4 CONTRACT AND TASK ORDER MANAGEMENT

As outlined in Section 2 of this document, the Office of Logistics and Acquisition Operations (OLAO) will provide contract-level management and oversight for the PICS contracts through the PICS Program Support Team. The Task Order Contracting Officer (CO) and Task Order Contracting Officer's Representative (COR) will perform day-to-day management and oversight for each task order.

4.1 Contract Management

The PICS Contracting Officer (CO) will perform contract administration duties while the PICS Contracting Officer's Representative (COR) will track and guide contract performance over the life of the contract. The PICS Program Support Team employs several methods and tools to assist this effort, in close concert with performance monitoring and evaluation efforts. These tools include the following.

4.1.1 Contract Files

The PICS Program Support Team maintains a central file for each of the contracts. The file contains the contract and all documentation; all contract modifications, correspondence, and performance evaluation reports, as well as copies of task orders, task order documentation, and task order modifications.

4.1.2 Training

The PICS Program Support Team will prepare and conduct training presentations to assist PICS customers and contractors in understanding and using the PICS contracts. Training sessions will also be held with the contractors to improve their understanding of the task order process. Training all parties involved will facilitate adherence to the task order procedures. In addition, materials such as this SOP document, FAQs, templates, and other supporting documents are available on the PICS Program Support Team's Web site at http://PICS.olao.od.nih.gov/. To request training for your office or IC, contact the PICS Program Support Team at (PICS1@mail.nih.gov).

4.2 Task Order Management

The Task Order CO and Task Order COR will be responsible for the task order activities involving initiating, awarding, administering, and closing out task orders. They will track and guide task order performance over the life of the task order. The PICS Program Support Team will assist all customers in their task order activities as well as log and maintain records of all task orders.

4.2.1 Initiation and Close-out of Task Orders

Task order initiation and close-out activities will be the responsibility of the Task Order CO and Task Order COR. These materials may be reviewed by the PICS COR.

4.2.2 Day-to-Day Oversight and Management

The Task Order CO and Task Order COR provide "frontline" day-to-day monitoring of the task order during the task order period of performance. Since this is a non-personal services contract, the Task Order CO and Task Order COR shall ensure that direct management of contractor personnel remains the responsibility of the contractor's management staff.





The Task Order CO and Task Order COR are responsible for monitoring and assessing the contractor's task order performance, including the responsiveness of the contractor management staff.

Contract level issues that arise during task order performance should be referred to the PICS Program Support Team for resolution (e.g., need for contract modifications, contract disputes, contract terminations).

4.2.3 Acceptance of Services

The Task Order CO and Task Order COR are responsible for inspection and acceptance of task order services provided. If services are rejected, this must be documented in writing to the contractor, with recitation of the requirement and factual statements of how the contractor failed to meet these requirements.

4.3 Task Order Modifications

Task order modifications are generally made to correct oversights or changes in conditions from the original task order. The following procedures will apply to task order modifications:

4.3.1 No-Cost Modifications

After obtaining approval by the PICS CO, no-cost modifications will be processed directly by the Task Order CO with input from the Task Order COR.

Copies of any task order modification executed are required to be sent to the PICS CO and COR via the PICS Program Support Team e-mail (PICS1@mail.nih.gov).

4.3.2 Addition of Funds

After obtaining approval by the PICS CO, modifications to add funds to a task order will be processed directly by the Task Order CO with funding documentation provided by the Task Order COR.

Copies of any task order modification executed are required to be sent to the PICS CO and COR via the PICS Program Support Team e-mail (PICS1@mail.nih.gov).

4.3.3 Additional Work / Additional Time

If the customer's modification requirement alters the scope, adds an additional period of performance, or provides for major changes such as additional work, a task order modification is not appropriate. Instead, a new TORP must be initiated.